

Agency Name	Program Name	Strategy	
Pernital Program Template		0	0

Funding Request

Staff Person

Volunteers

0

Org Strategic Plan	Board Invlvement
0 Err:509	Err:509

Purpose & Target Support	Target Populations	LY Performance	CY Performance	Projected Performance	Adaptability/Data usage
Err:509		8	8	8	8

Required Compnents	Preferred Compnents	Research based	Partnerships & Alliances	Volunteer Mgt	Budget alignment
Err:509	Err:509	Err:509	Err:509	Err:509	8

Leverage UW Funds	Total Score	Recomm Funding - YES/NO	% Funding	Rationale
Err:509	#VALUE!	0	0	0

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Agency Name: Pernital Program Template Program Name _____ Strategy _____

UW Staff: _____ Volunteers _____

Insert the Level # in the BOX for the desired level. Leave others blank. Example, if you have checked all of the items in Level Three, you would pl

Weight:	2					
SCORE:	8	Level One	Level Two	Level Three		
Target Populations Application Section G.	<input type="checkbox"/>	Less than 25% of participants are from a target population	<input type="checkbox"/>	Less than 25% of participants are from a target population	<input type="checkbox"/>	25% - 49% of participants are from a target population
	<input type="checkbox"/>	Services are not targeted to target populations	<input type="checkbox"/>	Some services are targeted to target populations	<input type="checkbox"/>	All services are targeted to target populations
	<input type="checkbox"/>	Program staff do not understand the needs of the target populations	<input type="checkbox"/>	Some program staff understand the needs of the target populations	<input type="checkbox"/>	Most program staff understand the needs of the target populations
	<input type="checkbox"/>		<input type="checkbox"/>	The program does not receive feedback from target population and cannot demonstrate response to changing needs of population	<input type="checkbox"/>	The program receives feedback annually from target population, but the program should be more responsive
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

RATIONALE

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Insert the Level # in the BOX for the desired level. Example, if you have checked all of the items in Level Three, you would pl

Weight:	2								
SCORE:	8	Level One		Level Two		Level Three			
Previous Performance (Last Year)	<input type="checkbox"/>	There is no evidence that the program summarizes outcome data		<input type="checkbox"/>	The program summarizes outcome data only 1 time a year and submitted year-end report to United Way last year; compared to 2 years of data		<input type="checkbox"/>	The program summarizes outcome data only 1 time a year and submitted year-end report to United Way last year; compared to 2 years of data	
	<input type="checkbox"/>	The program did not submit required reports to United Way on time							
	<input type="checkbox"/>	The program did not meet targets last year and DOES NOT have a reasonable explanation (reached less than 70% of target)		<input type="checkbox"/>	The program did not meet targets last year (reached 70- 84% of target) but DOES have a reasonable explanation		<input type="checkbox"/>	The program was slightly below targets last year (reached 85% - 94% of target) but DOES have a reasonable explanation	
	<input type="checkbox"/>						<input type="checkbox"/>	The program demonstrated there is a clear methodology for how targets are set	
Results Summary Document							<input type="checkbox"/>		

RATIONALE

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2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Insert the Level # in the BOX for the desired level. Leave others blank. Example, if you have checked all of the items in Level Three, you would pl

Weight:	2				
SCORE:	8	Level One	Level Two	Level Three	
Current Performance (Mid-Year)		Program is behind compared to last year and does not have the ability to meet targets by year-end	Program is behind compared to last year but has a reasonable plan for meeting targets by year-end	Program is in the same position as last year and has a reasonable plan* for meeting targets by year-end	
	Results Summary Document	<p>Includes:</p> <p>1) lack of understanding about challenges or barriers why they exist</p> <p>2) limited or insufficient resources, training, or staffing to address challenge</p> <p>3) non-specific/uncertain about steps needed to address or overcome challenges</p>		<p>Includes:</p> <p>1) clear understanding of why</p> <p>2) and use of data, processes or other reliable information to develop the plan</p> <p>3) resources (training, staffing, etc) to implement new plan</p> <p>4) adequate monitoring in place to provide sufficient warnings</p>	

RATIONALE

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2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Insert the Level # in the BOX for the desired level. Leave others blank. Example, if you have checked all of the items in Level Three, you would pl

Weight:
SCORE:

2
8

Level One

Level Two

Level Three

**Projected
Performance
(Next Year)**

**Results Summary
Document**

☐ Target Projections for next year have not been set for all of the required indicators

☐ Targets Projections for next year have been set for all of the required indicators

☐ Targets Projections for next year have been set for all of the required indicators

☐ There is no justification for the Target Projections provided

☐ There is a reasonable justification for Target Projections (It is reasonable to believe that the program can achieve the projections)

☐ Target Projections are not aligned with the dollars requested and program budget

☐ Target Projections are not aligned with the dollars requested and program budget

RATIONALE

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Insert the Level # in the BOX for the desired level. Leave others blank. Example, if you have checked all of the items in Level Three, you would pl

Weight:
SCORE:

2
8

Level One

Level Two

Level Three

**Program
Adaptability and
Use of Data for
Learning**

☐ Organizational leaders and Board members (including Board level sub-committees) do not typically see evaluation or performance data

Program is not able to provide examples of how performance data was used to make improvements or guide strategic decisions

☐

☐ Organizational leaders and Board members (including Board level sub-committees) review performance data once or twice a year

Program is not able to provide examples of how performance data is used to make improvements or guide strategic decisions

☐

☐ Organizational leaders and Board members (including Board level sub-committees) review performance data quarterly

Program is able to provide only one example of how performance data is used to make improvements or guide strategic decisions

☐

Performance data is focused on short term results (ex: a single quarter, month or year) and may focus solely on successes

☐

RATIONALE

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Insert the Level # in the BOX for the desired level. Leave others blank. Example, if you have checked all of the items in Level Three, you would pl

Weight:	2					
SCORE:	8	Level One	Level Two	Level Three		
Budget Alignment to Priorities Application Sections D, E, F	<input type="checkbox"/>	Budget narrative does not clearly support the program budget	<input type="checkbox"/>	Budget narrative is clear but does not align to program budget	<input type="checkbox"/>	Budget narrative is clear and align/supports the overall program budget
	<input type="checkbox"/>	Program is unable to provide a clear rationale/need for the amount requested from United Way	<input type="checkbox"/>	Program is able to provide a clear rationale/need for the amount but it does not align with funding request	<input type="checkbox"/>	Program clearly describes how United Way funds will be used to advance the program's goals and outcomes
	<input type="checkbox"/>	Program is unable to provide a clear explanation of how dollars from other funders will be utilized	<input type="checkbox"/>	Program is able to provide a clear explanation of how dollars from other funders will be utilized	<input type="checkbox"/>	Program is able to provide a clear explanation of how dollars from other funders will be utilized
					<input type="checkbox"/>	Program is able to demonstrate commitments from other funders

RATIONALE

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Application Submitted on time

Weight:	2	Level One	Level Two
SCORE:	2	No	Yes

TOTAL POINTS FOR ALL SCORED

Funding Recommendation: The purpose of this section is to provide a directional recommendation for funding that may be used

1. Do you recommend funding for this program?

Yes/No

2. What percentage of the funding request would you recommend for funding?

Record the percentage that you recommend in the space provided. The options are listed to the left.

3. Do you a contingency for this program?

Yes/No

4. Contingency Information

3. Provide a rationale to support the funding recommendation in the box below:

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.
4
Level Four
50% or more of participants are from target populations
All program staff understand the needs of the target populations
Program staff receives ongoing feedback from target population and is able demonstrate adjustments have been made to address specific needs of target populations

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.

4
Level Four

The program summarizes outcome data only 1 time a year and submitted year-end report to United Way last year; compared to 2 years of data

The program met targets last year. (reached 95% - 100% on all indicators)

OR

If the program exceeded targets of 120% or higher - The program staff are able to explain or justify why the program has exceeded the targets

The program demonstrated there is a clear methodology for how targets were set

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.

4
Level Four

Program is exceeding compared to last year and plans to meet/exceed their targets by year-end

OR

Program does not collect data at mid-year but has a track record

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.

4

Level Four

Targets Projections for next year have been set for all of the required indicators

There is a reasonable justification for Target Projections. (It is reasonable to believe that the program can achieve the projections)

Target Projections are aligned with the dollars requested and program budget

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.

4

Level Four

Organizational leaders and Board members (including Board level sub-committees) review performance data monthly or bi-monthly

Program is able to provide multiple examples of how performance data is used to make improvements or guide strategic decisions

Performance data is used to critically examine long term (ex: trends over multiple years) results both successes and challenges

Staff is proactive in building their own capacity to understand and use data by participating in trainings, webinars, and/or networks [Example(s) provided]

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

Place a 3 in the box.

4

Level Four

Program has demonstrated all three criteria from level three

Program clearly demonstrates how the United Way portion of the budget is necessary for program implementation and can specify the impact if request is not met

Program has a plan in place to address budget gaps and potential revenue losses from other sources

2017- 2018 UWGA IMPACT FUND ASSESSMENT TOOL

CRITERIA **50**

during the Wrap up meeting.

100% of current funding

80% of current funding

60% of current funding

Less than 60% of current funding

Other: